

# Legacy Society

## JOIN THE CHULA VISTA PUBLIC LIBRARY LEGACY SOCIETY TODAY!

The Legacy Society is a group of Chula Vista Public Library benefactors who have provided a bequest in their wills or who have made another type of estate gift to support the work of the Library. There are no membership fees or minimum required gift amounts to join the Legacy Society. The size of the gift is at your discretion and will remain confidential.

By remembering the Chula Vista Public Library with a bequest in your will, you can have an impact on Library collections and programs that go far beyond your lifetime. In addition, your bequest may qualify for an estate tax charitable deduction.

Through the Legacy Society, the Chula Vista Public Library accomplishes a twofold purpose:

- To thank those who have made legacy gifts to the Chula Vista Public Library through wills, life insurance, and other gift vehicles
- To encourage others to consider making these same legacy gifts to the Chula Vista Public Library

The following types of gifts qualify the donor for membership in the Legacy Society:

### □ **BEQUEST** REQUEST

Through a will or living trust, you may give the Chula Vista Public Library a specific dollar amount, a particular asset, or some portion of the residue of your estate after your other beneficiaries have been provided for.

### □ **LIFE INSURANCE** LIFE INSURANCE

By naming the Chula Vista Public Library as a beneficiary of a life insurance policy, you may be able to provide a larger charitable gift than you would otherwise feel capable of making.

### □ **RETIREMENT ASSETS** RETIREMENT ASSETS

You may provide for a future gift by leaving the Chula Vista Public Library all or a portion of your remaining retirement assets or by naming the Chula Vista Public Library as a beneficiary of your retirement plan(s).

If you have included the Chula Vista Public Library in your estate plans, please let us know. We value the opportunity to thank you and show our appreciation for your generosity in supporting the Library.

---

For more information, please contact:  
Betty Waznis, Library Director • (619) 691-5170

---

The Community's Family Room • [www.chulavistalibrary.com](http://www.chulavistalibrary.com)



**PUBLIC LIBRARY**  
CHULA VISTA



# LEGACY SOCIETY APPLICATION

The following information will be kept confidential. MAIL DIRECTLY TO:  
 Betty Waznis, Library Director  
 Chula Vista Public Library / Legacy Society • 365 F Street, Chula Vista, CA 91910

## CONFIDENTIAL

(Please print all information.)

Full name, including middle:  
 Mr./Mrs./Ms. \_\_\_\_\_

Full name of spouse or registered domestic partner, including middle:  
 Mr./Mrs./Ms. \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ E-Mail \_\_\_\_\_

Day phone (\_\_\_\_) \_\_\_\_\_ Evening phone (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

- ☐ I (we) accept your offer to become a member of the Chula Vista Public Library's Legacy Society.
- ☐ I understand that only Betty Waznis will be compiling my (our) information for recording purposes and that my (our) privacy will be maintained as indicated below.
- ☐ You may use my (our) name(s) in publications and lists that recognize Legacy Society members.  
 NAME(S) TO APPEAR EXACTLY AS FOLLOWS (please print):  
 \_\_\_\_\_  
 \_\_\_\_\_

☐ You may NOT use my (our) name(s) in publications & lists that recognize Legacy Society members.

☐ Special instructions & restrictions:  
 \_\_\_\_\_  
 \_\_\_\_\_

I (We) have made provision for the Chula Vista Public Library in my (our) estate plans as follows:

<u>GIFT VEHICLE</u>	<u>ESTIMATED \$</u>	<u>REVOCABLE</u>	<u>IRREVOCABLE</u>
Gift by Bequest			
•General Bequest			
•Specific Asset Bequest			
•Residuary Bequest			
•Percentage Bequest			
•Contingent Bequest			
•Restricted Bequest			
•Codicil			
•Charitable Trust By Will			
Life Insurance Beneficiary			
Retirement Plan Beneficiary			
Mutual Fund Beneficiary			

Signature: \_\_\_\_\_ Date \_\_\_\_\_

Signature: \_\_\_\_\_ Date \_\_\_\_\_

# WAYS TO MAKE A GIFT THROUGH YOUR WILL

## GENERAL

### □ GENERAL BEQUESTS

This is one of the most popular ways to make a gift. You simply leave the Library a specified dollar amount.

*I give the sum of \$\_\_\_\_\_ to the Chula Vista Public Library, a government entity located in Chula Vista, California, for its general educational purposes.*

## SPECIFIC

### □ SPECIFIC BEQUESTS

Here, you designate that the Library receives a specific asset from your estate. Stocks, bonds, mutual fund shares, real estate and personal property (such as works of art or antiques) can constitute a specific bequest.

*I give \_\_\_\_\_ (insert a description of the asset) to the Chula Vista Public Library, a government entity located in Chula Vista, California, for its general educational purposes.*

## RESIDUARY

### □ RESIDUARY BEQUESTS

You can specify that the residue or a percentage of the residue of your estate be paid to the Library after all debts, taxes, expenses and all other bequests have been paid.

*I give the rest of the property I own at my death to the Chula Vista Public Library, a government entity located in Chula Vista, California, to be used for its general educational purposes.*

## PERCENTAGE

### □ PERCENTAGE BEQUESTS

A bequest may also be expressed as a percentage of your estate or of the residuary of your estate.

*I give \_\_\_% of my estate to the Chula Vista Public Library, a government entity located in Chula Vista, California, for its general educational purposes.*

## CONTINGENT

### □ CONTINGENT BEQUESTS

In this case, you name the Library to receive all or some of your estate if your primary heirs predecease you.

*If \_\_\_\_\_ (insert the name of your heir) predeceases me or disclaims any interest in \_\_\_\_\_ (describe the asset or portion of your estate), I give such property to the Chula Vista Public Library, a government entity located in Chula Vista, California, for its general educational purposes.*

## RESTRICTED

### □ RESTRICTED BEQUESTS

You may wish to restrict your bequest to a specific purpose at the Library (for example, to memorialize a family member or a colleague, or to support a particular program).

*I give \$ \_\_\_\_\_ (insert dollar amount or asset) to the Chula Vista Public Library, a government entity located in Chula Vista, California. This gift shall be held in a permanent endowment fund to be known as the \_\_\_\_\_ (insert your desired fund name), income only from which may be used to support \_\_\_\_\_ (insert tax-exempt purpose for which the gift is made).*

### □ CODICIL TO YOUR WILL

If you already have a will and wish to change a beneficiary or add a bequest to the Library, ask your lawyer to draft a codicil for you to sign. All provisions of your existing will shall be retained except those which are modified by the codicil.

### □ CHARITABLE TRUSTS BY WILL

If you set up a trust by will, your heirs receive income from an asset during their lifetimes, and then at their deaths, the principal goes to the Library.

---

The Chula Vista Public Library is an exempt organization for purposes of receiving charitable donations or grants under IRS Code 170(c)(1). Contributions are tax-deductible to the full extent of the law.

---

The Community's Family Room • [www.chulavistalibrary.com](http://www.chulavistalibrary.com)



**PUBLIC LIBRARY**  
CHULA VISTA